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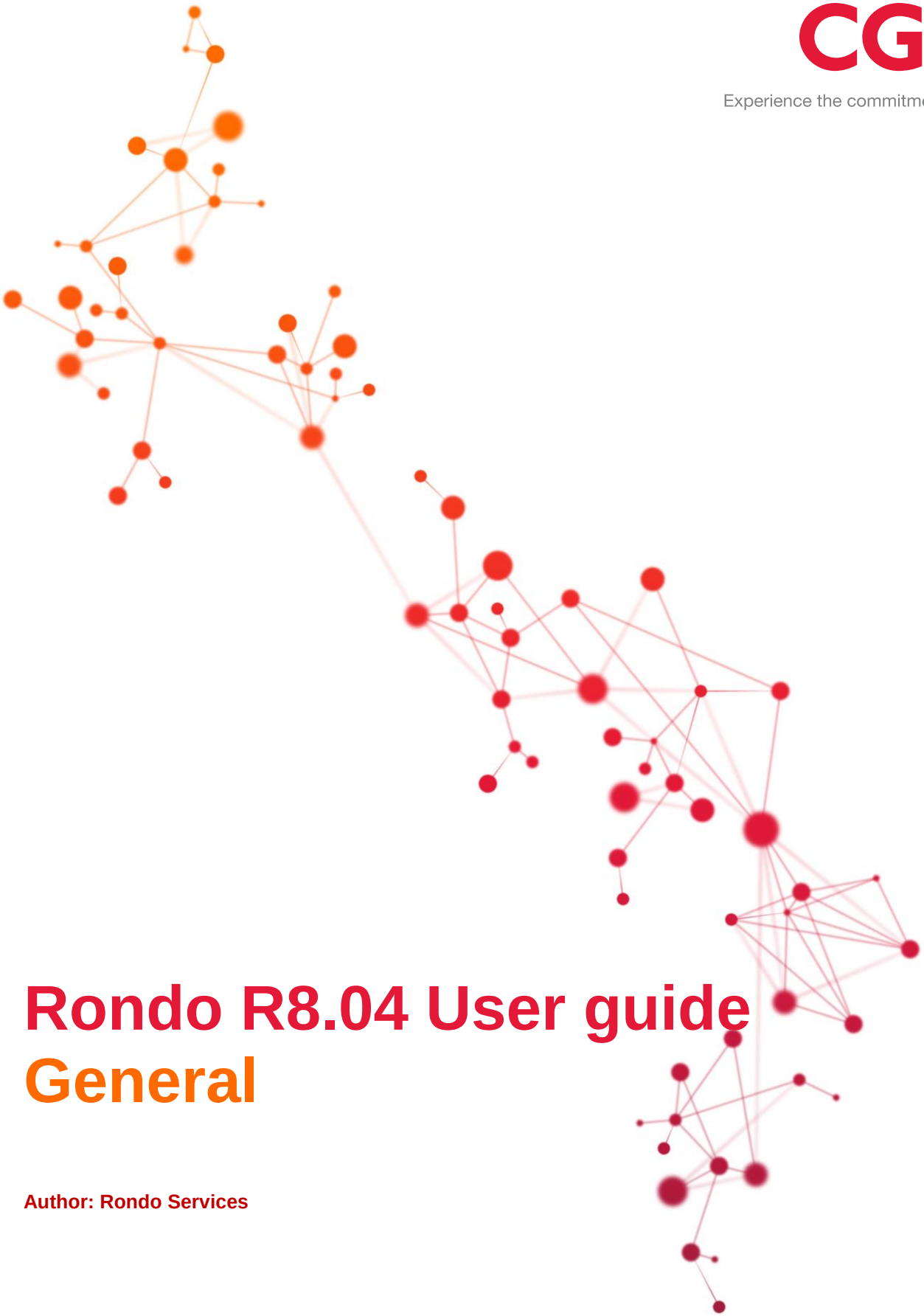

Rondo R8.04 User guide
General

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11.4.2014
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1 Overview

Rondo is a system for digital document management which is mainly used for the purposes of

- electronic archives,
- paper-free approval procedure of documents (purchase invoices, memo vouchers, contracts, employment suggestions etc.),
- processing purchase requests and
- reporting.

Features, functions and fields in the Rondo system are defined individually for each customer according to their wishes. For example, locks controlling the functions for making queries and adding and deleting information are defined separately for each user and each function. Therefore, the Rondo user interfaces may look very different between various users.

1.1 Logging in the system

The user logs in the system by entering a user name and a password. The super user of the system is responsible for creating user names.

The system's language is selected in the drop-down list, e.g. Finnish (fin).

If you want right language, it must include in URL. And when logging out you mark that link as favourites.

E.g.

http://xxx.yy.zz.cc:8080/rondor8-gui?locale=en_GB

http:// xxx.yy.zz.cc:8080/rondor8-gui?locale=fi_FI

When the user has entered the **user name** and the **password** in the fields in the login dialogue, he/she can log in the system by clicking the **Login** button.

1.1.1 Forgotten password

If the user has forgotten his/her password, the system will assign a new password to the user with the function **Have you forgotten your password?** When clicking the function, the system opens a new dialogue **Retrieving lost password**.

The user enters the **user name** or the **e-mail address** in the fields in the dialogue. The request is activated by clicking the **Send** button, and the system sends a new password to the user by e-mail providing that an e-mail address has been defined for the user.

If the user has forgotten both his/her user name and e-mail address, he/she must contact the system administrator.

The user is able to return to the login dialogue by clicking **Back to the login screen**.

1.1.2 Invalid password

If the user tries to log in the system with an invalid user name or password, the system will display a notification (as in the dialogue above).

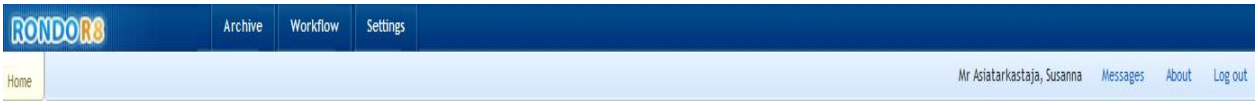
The user can try to login until the maximum number of tries defined in the Admin/System/Instances section is exceeded. The super user must reset the locked password.

1.2 Expired session

The session expires when the time the Rondo system has not been used exceeds the minimum value of the session cleanup interval which is defined in the section Admin/System/System maintenance/System properties. If the session expires, the user must log in the system again.

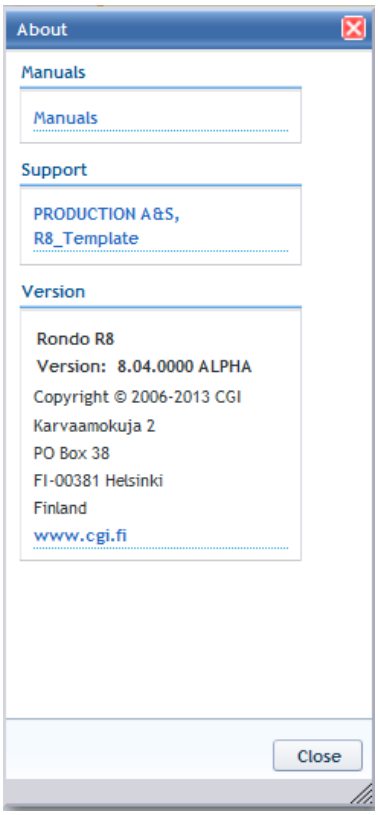
1.3 Closing the system

The user leaves the system with the **Log out** function available in the top right corner of the programme.



1.4 About

The **About** function opens a dialogue where the version number of the current Rondo programme and the information of the software provider are presented.



The list of Rondo manuals is available in the **Manuals** link.

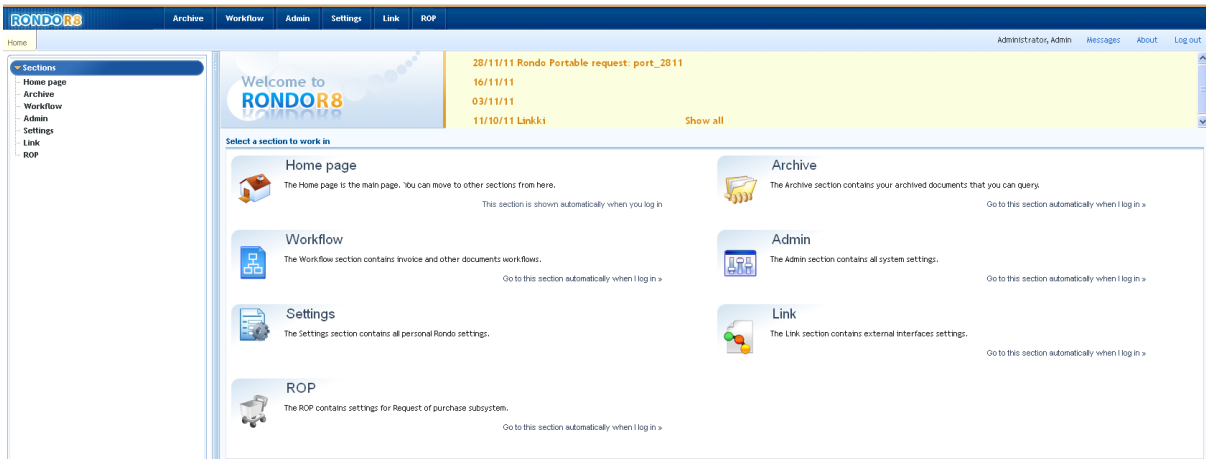
The customer's own support site is available in the **Support** link. User support sites are established outside the Rondo system, and references to these sites are defined separately for each instance. Each instance may have its own support site.

Information below the **Version** header contains the Rondo version number and CGI's address data. The link www.cgi.fi moves the user to Logica's Finnish website.

1.5 General view

1.5.1 Home page

After the user has logged in Rondo, the system will display the programme's home page initialised with the user's personal settings and user rights. For example, the user may only have the right to access the Archive section in which case only the **Archive** and **Settings** sections are displayed.



The Settings section contains the user-specific system settings (changing the password and the approve password, absence settings and other general settings), which are available to all users.

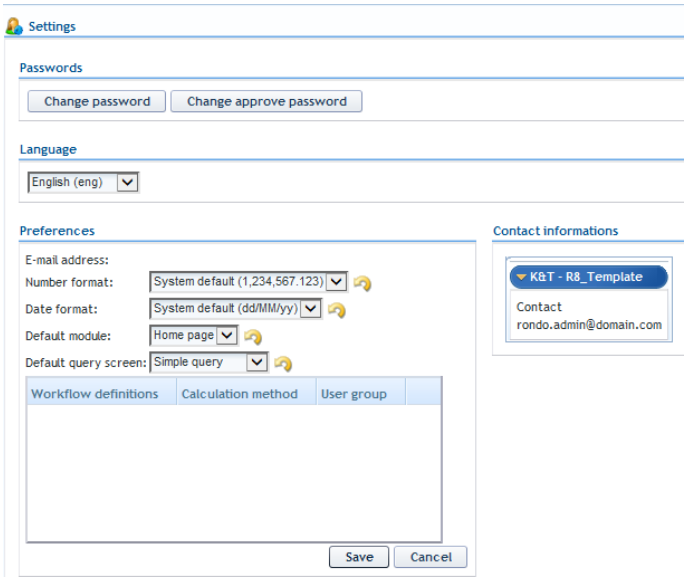
1.5.2 Changing the view

The user is able to personalise his/her user interface view: it is possible to hide sections or change their size. For example, in the Workflow section the user can hide the basic information framework from a document or hide the Sections framework in the left on the home page by moving the bar between the frameworks so that only the framework for selecting a section and the sections the user is entitled to work with are displayed.

In addition, the user can define a desired section as a preferred section in the Settings tab.

The user can select either Home page, Admin, Workflow or Archive as the default section by using the **Default module** picklist.

The user selects either a simple query or advanced query as the default setting in the **Default query screen** picklist.

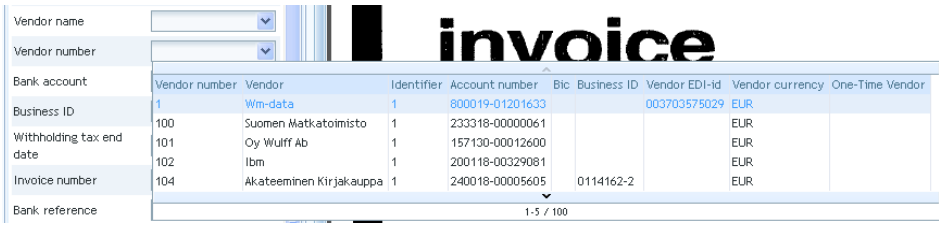


2 Document search

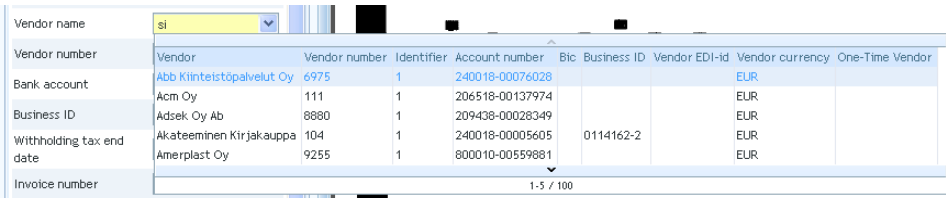
2.1 Search function

2.1.1 Searching information in a picklist

With fields including a picklist in workflow, archive, settings etc. sections (e.g. the vendor's name), the user can open a drop-down menu by clicking the button. The picklist contains 5 values at a time, and the user is able to browse the list with the arrows above and below the framework.


Vendor name
Vendor number
Bank account
Business ID
Withholding tax end date
Invoice number
Bank reference
invoice
Vendor number Vendor Identifier Account number Bic Business ID Vendor EDI-id Vendor currency One-Time Vendor
1 Wm-data 1 800019-01201633 003703575029 EUR
100 Suomen Matkatoimisto 1 233318-00000061 EUR
101 Oy Wulff Ab 1 157130-00012600 EUR
102 Ibm 1 200118-00329081 EUR
104 Akateeminen Kirjakauppa 1 240018-00005605 0114162-2 EUR
1-5 / 100

Information can be searched from fields with a picklist by entering a character string in the field after which those rows that include the said string are displayed in the list. For example, when the user enters the string "**si**" in the vendor's name field, the picklist will include all vendors whose name contains the string "si".

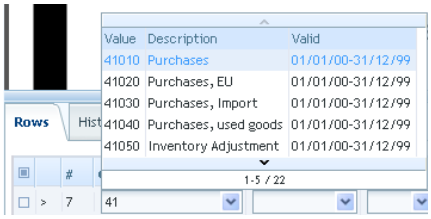

Vendor name
si
Vendor number
Bank account
Business ID
Withholding tax end date
Invoice number
Vendor Vendor number Identifier Account number Bic Business ID Vendor EDI-id Vendor currency One-Time Vendor
Abb Kiinteistöpalvelut Oy 6975 1 240018-00076028 EUR
Acm Oy 111 1 206518-00137974 EUR
Adsek Oy Ab 8880 1 209438-00028349 EUR
Akateeminen Kirjakauppa 104 1 240018-00005605 0114162-2 EUR
Amerplast Oy 9255 1 800010-00559881 EUR
1-5 / 100

The same method can be used with the vendor number field: the user enters e.g. "110" in the field after which all vendor numbers containing the string "110" will be displayed in the list.

Vendor name
Vendor number
110
Bank account
Business ID
Withholding tax end date
invoice
Vendor number Vendor Identifier Account number Bic Business ID Vendor EDI-id Vendor currency One-Time Vendor
110 Helsingin Vesi 1 2302-0002451145 EUR
1103 Lignell & Piispanen 1 560005-20016000 EUR
1-2 / 2

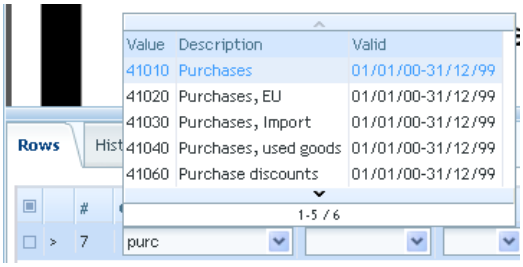
With the posting function, the same principle can be applied when searching information in the bank account field. For example, the user enters “41” in the bank account field, which will produce all accounts containing the string "41" as the result.

The same method can be used for searching information in all posting fields containing a picklist.



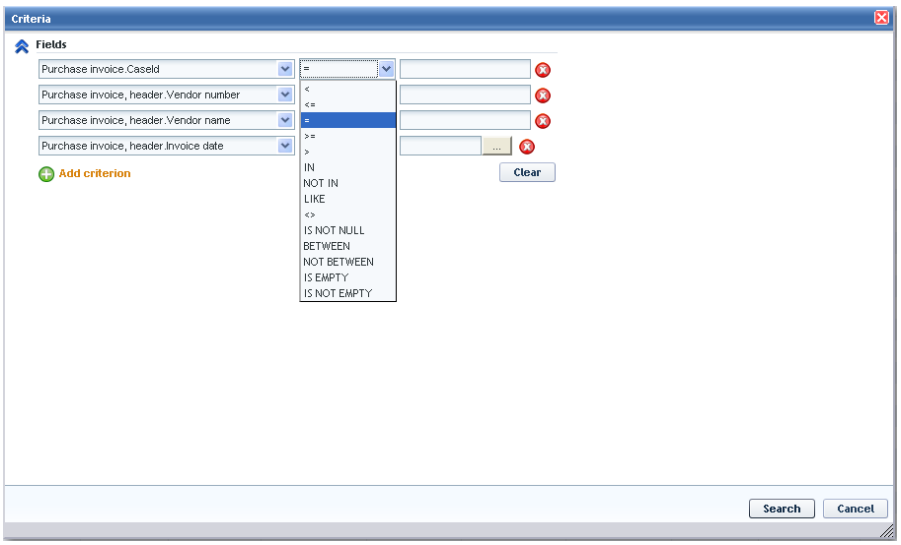
The bank account name can also be used for searching information in the posting function. For example, the user enters the string “purc” in the field, which will produce all account names containing the string “purc” as the result.

The same method can be used for searching information in all posting fields containing a picklist.



2.1.2 Operators in search criteria

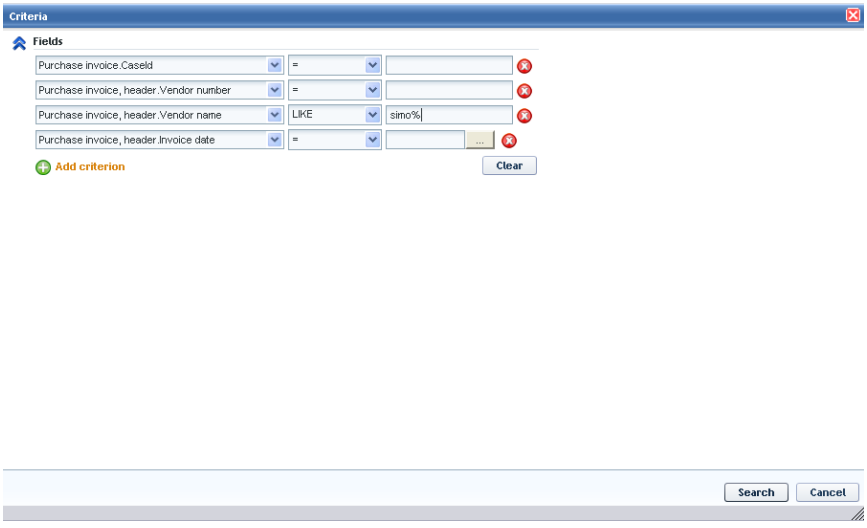
The following search operators can be used when searching information in the archive/workflow folder.



<	smaller than
<=	smaller than or equal to
=	equal to
>=	greater than or equal to
>	greater than
In	within the given values
Not in	not within the given value set
Like	e.g. “No%” refers to all targets beginning with No
<>	unequal to
Is null	is null
Is not null	is not null
Between	between the values
Not between	not between the values
Is empty	the value is empty
Is true	the value is true
Is false	the value is false

2.1.3 Search examples

The user can search for information in the search dialogues e.g. with the vendor’s name, a person’s name or description.



In such search fields, it is advisable to use the LIKE condition and the so-called percent sign (%) to replace the beginning or the end of a word. The following are examples of the search function:

Search field name	Operator	Search text	Description
Vendor	**=**	Yritys Oyj	Searches documents whose vendor information is “Yritys Oyj”
Vendor	**LIKE**	Yri% ”Yr*”	Searches documents whose vendor information begins with the string “Yri”
Vendor	**LIKE**	%rit% ”*rit*”	Searches documents whose vendor information contains the string “rit”, e.g. the vendor “Yritys Oyj”
Access key	**LIKE**	%pinv_%	Searches all access keys that contain the string “pinv”, e.g. pinv_user, pinv3_user
Access key	**LIKE**	%pinv[_]%	Searches all access keys that begin with the string “pinv_”, e.g. pinv_user
Person	**LIKE**	**%**Jaakko%	Searches documents whose personal information contains the word “Jaakko”, e.g. “Jaakko Virtanen”, “Liisa Jaakkola”

It is also possible to search for information in search dialogues e.g. with the vendor number and the gross amount. With these search criteria, it is possible to use various comparison signs. The following are examples of the search function:

Search field	Operator	Search text	Description
Number field		”5”	Searches the exact value 5
Number field		”5*”	Searches figures beginning with 5
Number field		”*5*”	Searches all figures containing 5 at any point
Number field		”*5”	Searches figures ending with 5
Vendor number	**=**	25642 “25642”	Searches vendors whose number is exactly 25642
Gross amount	**=**	50000	Searches documents whose gross amount is EUR 50,000
Gross amount	**>**	50000	Searches documents whose gross amount is greater than EUR 50,000
Gross amount	**>=**	50000	Searches documents whose gross amount is greater than or equal to EUR 50,000
Gross amount	**<**	50000	Searches documents whose gross amount is smaller than EUR 50,000
Gross amount	**<=**	50000	Searches documents whose gross amount is smaller than or equal to EUR 50,000
Gross amount	**<>**	50000	Searches documents whose gross amount is unequal to EUR 50,000
Gross amount	**BETWEEN**	50–100	Searches documents whose gross amount is between EUR 50–100

Gross amount	**NOT BETWEEN**	50–100	Searches documents whose gross amount is not between EUR 50–100
Gross amount	**IN**	100, 200, 300	Searches documents whose gross amount is either EUR 100, 200 or 300
Gross amount	**NOT IN**	100, 200	Searches documents whose gross amount is not EUR 100 or 200
Gross amount	**IS NOT NULL**		Searches documents whose gross amount is not null
Gross amount	**IS EMPTY**		Searches documents whose gross amount is empty

Comparison signs can be used with search fields that are in date format and with numeric fields. Such fields could be, for example, invoice date, due date, document date, entry date and GRN date. The following are examples of the search function:

Search field	Operator	Search text	Description
Document date	**=**	11.12.2007	Searches documents whose document date is exactly 11 December 2007
Document date	**>**	11.12.2007	Searches documents whose document date is greater than 11 December 2007
Document date	**>=**	11.12.2007	Searches documents whose document date is smaller than 11 December 2007
Document date	**<**	11.12.2007	Searches documents whose document date is before 11 December 2007
Document date	**<=**	11.12.2007	Searches documents whose document date is before or exactly 11 December 2007
Document date	**<>**	11.12.2007	Searches documents whose document date is not 11 December 2007
Document date	**BETWEEN**	1.12.2007–30.12.2007	Searches documents whose document date is in December 2007
Document date	**NOT BETWEEN**	1.12.2007–30.12.2007	Searches documents whose document date is not in December 2007
Document date	**IN**	11.12.2007, 12.12.2007	Searches documents whose document date is either 11 December 2007 or 12 December 2007
Document date	**NOT IN**	11.12.2007, 12.12.2007	Searches documents whose document date is neither 11 December 2007 nor 12 December 2007
Document date	**IS NOT NULL**		Searches documents whose document date is not null
Document date	**IS EMPTY**		Searches documents whose document date is empty

The user can combine different fields to form the search criteria. For example, information can be searched with the vendor number and the date.

2.2 Search result

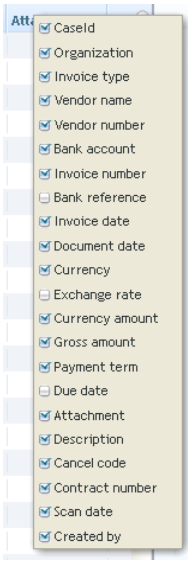
In the Results dialogue, the user can sort rows, change the order of the columns and hide columns.

The search result is **sorted** by clicking the column's header. In the example below, sorting has been made in descending order (arrow down) according to the invoice date.

Bank reference	Invoice date	Document date	Currency
	29/11/11	29/11/11	EUR
	21/11/11	21/11/11	EUR
	18/11/11	18/11/11	EUR
	04/11/11	04/11/11	USD
	24/10/11	24/10/11	EUR
	24/10/11	24/10/11	EUR

The order of the columns is changed by dragging the column header to the left or to the right to the desired position.

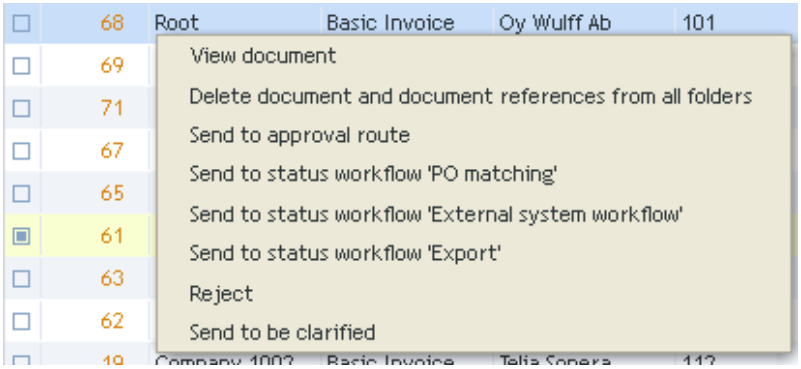
The columns are hidden in the field list which can be opened with an arrow on the top right corner of the search result list. The fields that the user wants to hide are removed from the field list (by removing the tick in front of the field in question) after which they won't be displayed in the search result anymore.



In the example above, the fields Bank reference, Exchange rate and Due date are hidden.

2.2.1 Handling a document

Documents selected in the list are handled with menu item functions available by clicking the right button of the mouse. The functions displayed in the menu depend on the system's settings.



The **View document** function opens a document dialogue where the document's image, header data and posting will be displayed.

The document dialogue can also be opened by selecting the document's CaseID number in the list. The document will be handled with functions in the document dialogue.

The selected document is deleted with the function **Delete document and document references from all folders**.

The selected document is sent to next processors with functions available in the dialogue under the menu item **Send to approval route**.

Status workflows are defined for each workflow separately, and the time when the document is sent to the status workflow can be defined to take place at a certain workflow phase. In the example above, it has been defined that the user has the possibility to send unrouted documents to status workflows "PO matching", "External system workflow" and "Export".

For example, the document is sent to a system outside of Rondo with the function **Send to status workflow 'External system workflow'**.

The **Reject** function sends the document back to the user who is responsible for document management. The user must provide a comment if he/she rejects a document.

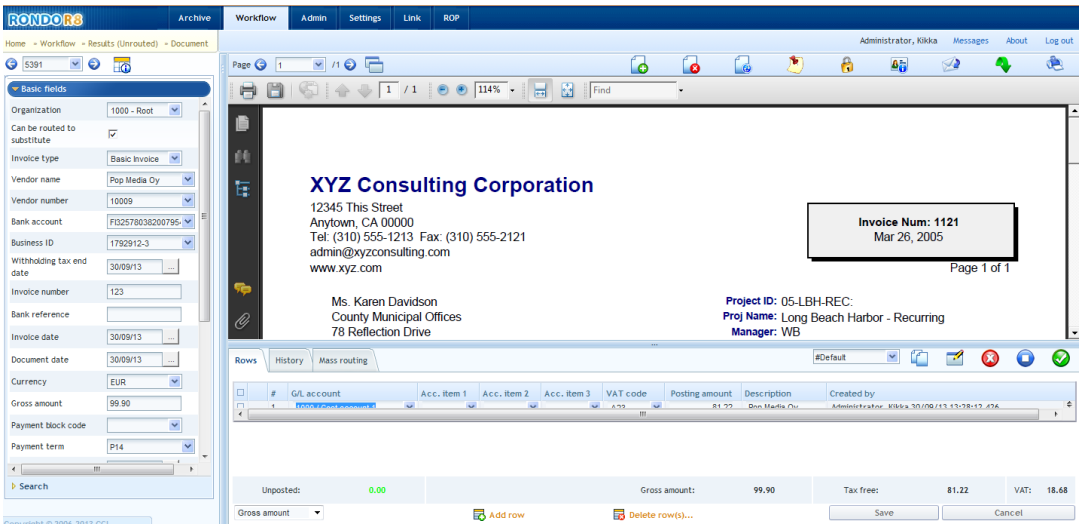
The **Send to be clarified** function moves the document to the user's own folder for documents requiring further investigation.

The same functions for handling documents are available in the document dialogue.

2.2.2 Vieving a document

When the user wants to examine a document in more detail, the desired document is selected in the Results dialogue by clicking the CaseID or by selecting the “View document” function available by clicking the right button of the mouse.

The system will open a document dialogue where an image of the document, as well as the document’s header and its row data are displayed. The document can be processed further with the functions in the document dialogue.



2.2.3 Drilling down and grouping

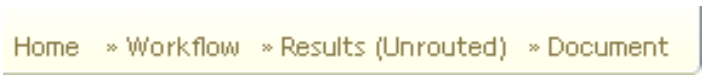
The user can group a query executed as an advanced query as he/she wants, and the user is able to drill down to individual lines from the sum-level query executed as an advanced query.

In order to be able to group and drill down information, the user must define the index field(s) into grouping fields.

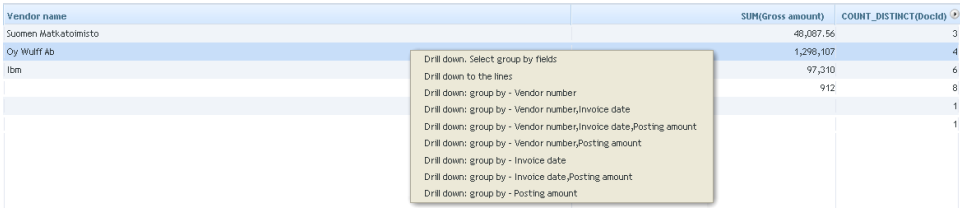
2.2.3.1 Grouping

The user can group a query executed as an advanced query as he/she wants (the available grouping fields have been defined in the archive index configuration in the Admin/System section).

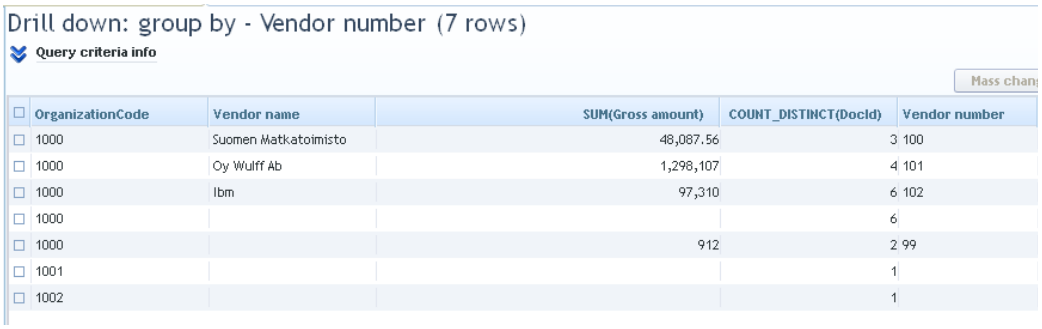
Each grouping performed by the user will be opened into a separate Result dialogue. The user can move from one result dialogue to another by using a "breadcrumb".



In the example below, a sum-level query has been performed to the purchase request table. A list of the available grouping functions is displayed by clicking the right button of the mouse.



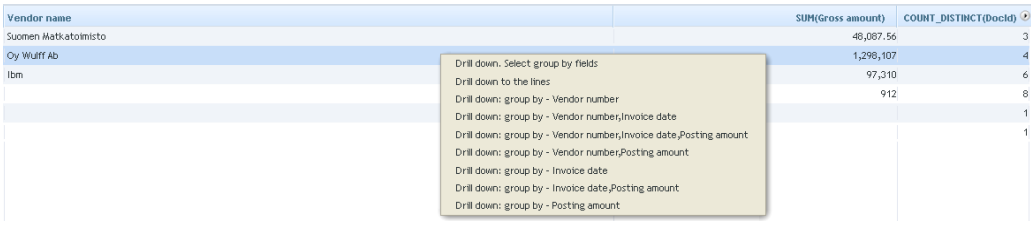
The **Drill down: group by – Vendor number** function opens the search results to a new Result dialogue in the following way:



2.2.3.2 Drilling down to the lines

The user is able to drill down to individual lines from the sum-level query executed as an advanced query.

In the example below, a sum-level query has been performed to the purchase request table. A list of the available grouping functions is displayed by clicking the right button of the mouse.



The **Drill down to the lines** function opens the search results to a new dialogue in the following way:

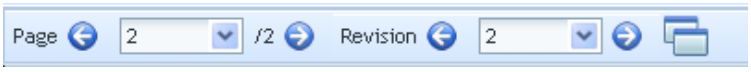
2.2.4 Field link

The information in various document folders is connected to one another with field links. The document folder field is linked to a field in another folder. For example, the purchase invoice folder can be linked to the order folder on the basis of the order number field.

Field links are maintained in the system's section Admin/Indexes/Index links.

3 General functions in Rondo

3.1 Browsing pages and revisions



The user can browse the document's pages with the picklist or arrow keys (previous page, next page) located in the bar above the image next to **Page**.

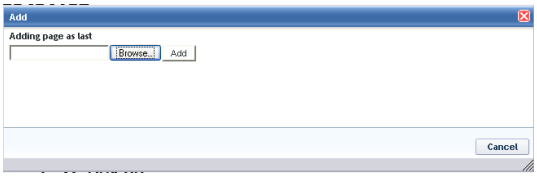
Revisions which may have been added to the document's pages can be browsed with the picklist or arrow keys (previous page, next page) located in the bar above the image next to **Revision**.

If the document contains several pages, the page number of the open page and the total number of pages are displayed in the bar. For example, 3/3 means that the document has three pages and page number 3 is displayed. The revision field always contains the most recent revision of the page which at the same time indicates the total number of revisions.

Open the page in new dialogue function opens the page in a new dialogue.

3.2 Add a new page to the current document

The user adds new pages to the document with the function . The new page is added as the last page in the document.

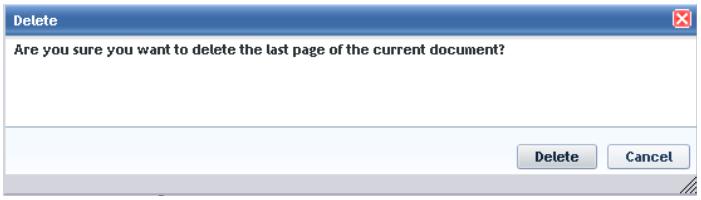


The user searches the document to be added with the **Browse** button and adds it with the **Add** button.

The **Cancel** button closes the dialogue without adding a new page.

3.3 Delete the current document's last page

The user deletes pages in the document with the function .



The system asks the user to verify the deletion.

The **Delete** button deletes the last page of the document.

The **Cancel** button closes the dialogue without deleting the last page.

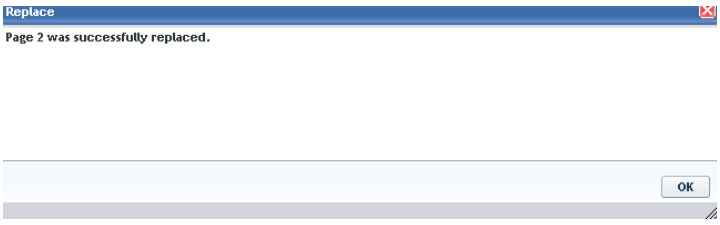
3.4 Replace the current page with a new one

The user can replace an active page with a new page with the button

The system notifies the user that page x is being replaced (x = page number).

The user searches the replacing page with the **Browse** button and replaces the current page with it with the **Replace** button. The old page will remain in the system and can be viewed as the previous revision of the page.

The **Cancel** button closes the dialogue without replacing the page.



The system notifies the user when the page has been replaced.

The user sets off the notification by clicking **OK**.

3.5 Display the document details

A date after which a document can be deleted can be defined for documents in the archive.

The user can view the document details with the button .

Series indicates the text series which the document belongs to in the archive.

Default expiry date indicates the date when the document expires and can be deleted completely.

Document in retention held indicates that the document can never be deleted.

When the user checks the **EBR in use** checkbox, he/she is able to enter the EBR date.

EBR date is the document's expiry date which can be earlier or later than the default expiry date.

The information is saved with the **Set** button.

The **Cancel** button closes the dialogue without saving the information.

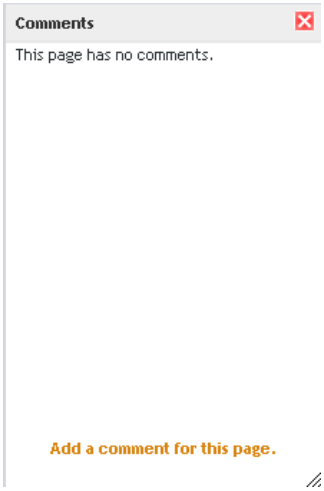
3.6 View/Edit comments on the page

The user is able to add comments in the documents in Rondo. A comment is free-form text relating to the document.

Comments are useful when the users want to add follow-up information or notes in the document. If the user rejects a document, he/she must provide a comment.

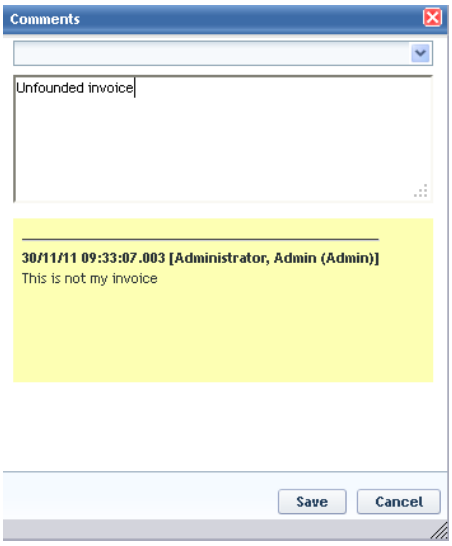
Commments are page-specific and can be added to all pages in the document.

When the user clicks the **View/Edit comments on the page** button , the system will open a framework where the user can view the existing comments and move on to adding a new comment.

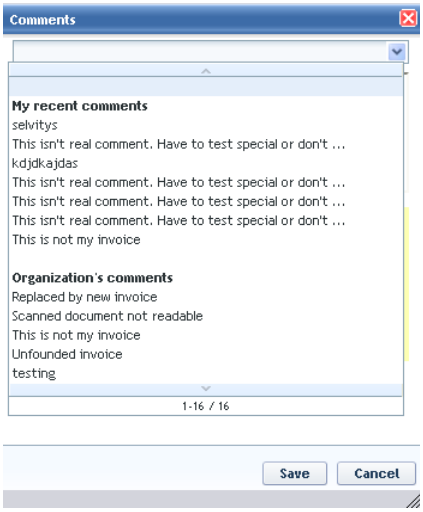


If the document doesn't contain comments, the text **This page has no comments** is displayed in the framework.

The user can add a new comment for the page with the function **Add a comment for this page**.

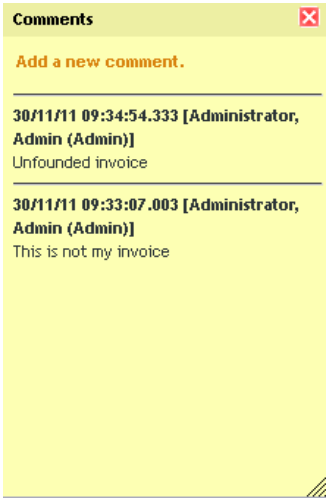


The user is able to view his/her previous comments with the help of the picklist and also organisation-specific comment templates which have been defined in the settings of the system's section Admin/Workflow/Workflow. Both the previous comments and the templates can be made use of when entering new comments in the document.


Comments
My recent comments
selvitys
This isn't real comment. Have to test special or don't ...
kdjdkajdas
This isn't real comment. Have to test special or don't ...
This isn't real comment. Have to test special or don't ...
This isn't real comment. Have to test special or don't ...
This is not my invoice
Organization's comments
Replaced by new invoice
Scanned document not readable
This is not my invoice
Unfounded invoice
testing
1-16 / 16
Save
Cancel

The comment is entered in the white area in the adding dialogue and attached to the document with the **Save** function. The date and time and the author of the comment are saved automatically.

If the document contains previous comments, the new comment is added with the function **Add comments on the current page**. The previus comments are displayed in the yellow area of the adding dialogue.

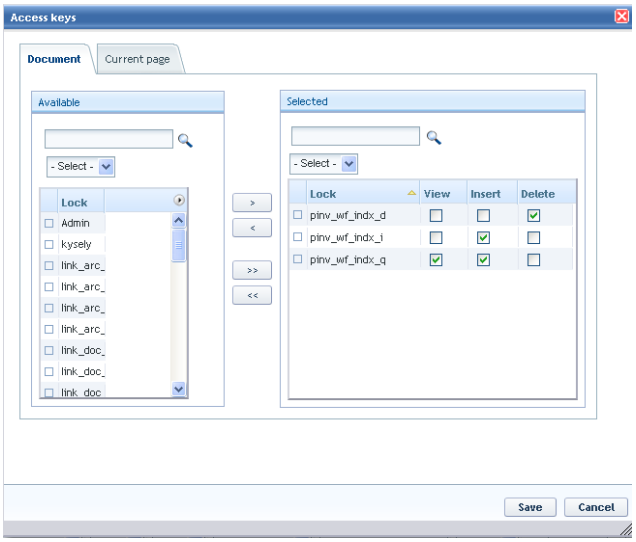


The comment is visible on top of the document's page. The user can minimise/maximise the comment dialogue by dragging the framework from the bottom right corner. All comments in the document are displayed one after the other, with the most recent comment on the top.

The **Cancel** button closes the dialogue for adding a comment without saving the provided comment.

3.7 Examine the document's access keys

The user can view and also edit the access keys in the document and in the document's pages by clicking the button **Examine document access keys**.



Access keys protecting the entire document are defined with the functions in the **Document** tab. Access keys protecting the current page are defined in the **Current page** tab.

Locks whose access key gives the user the right to view the document are defined in the **View** column.

Locks whose access key gives the user the right to add pages in the document are defined in the **Insert** column.

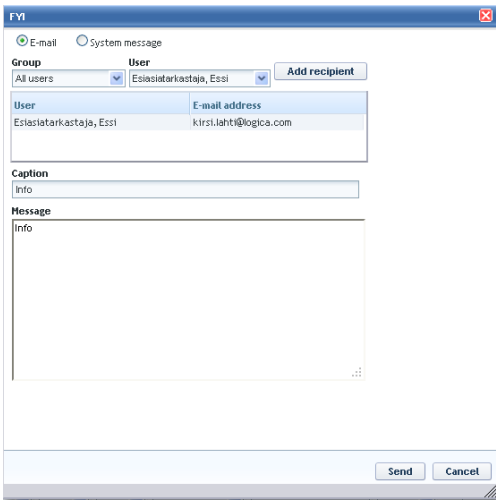
Locks whose access key gives the user the right to delete pages in the document are defined in the **Delete** column.

The **Save** button saves the changes made in the document's locks.

The **Cancel** button closes the access keys dialogue without saving the changes made.

3.8 Send the document ‘For your information’

The user can send the document to a user group or a user (FYI) with the button. The document can be sent either by e-mail or as a system message.



When selecting **E-mail** as the delivery method, the document is sent by e-mail.

The e-mail contains a direct link to the document, which takes the user to the Rondo login dialogue. After the user has entered a user name and a password, he/she is able to access the sent document. The format of the message is as follows:

Rondo document 107 has been sent to you FYI

http://localhost:8080/rondor8-gui?instanceIdentifier=main&targetType=workflow&targetIdentifier=WD1&caseId=107
More information: from routed documents

Sender:
Admin Administrator
rondo.admin@logica.com

When the message is sent as a **System message**, the message title is displayed in the yellow area on the user’s home page which is reserved for system messages.

The user group which the recipient belongs to is selected in the **Group** picklist.

The user(s) to whom the document is sent FYI is selected in the **User** picklist. The user is transferred to the framework below the picklists with the **Add recipient** button.

The **Caption** field contains the message title which is displayed e.g. on the recipient's home page.

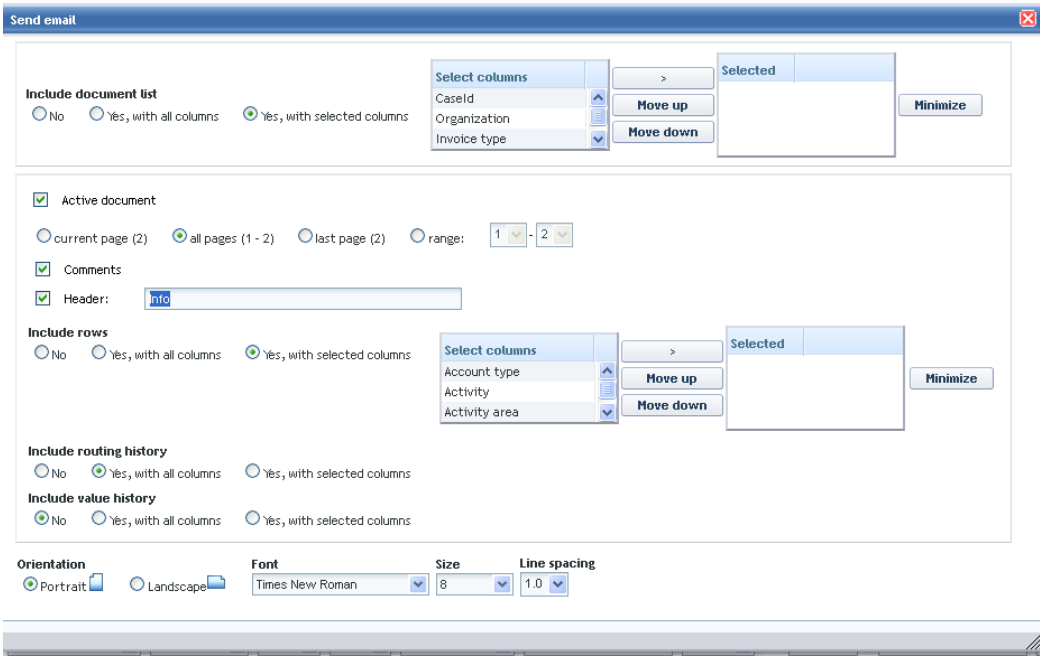
The actual message to the user is entered in the **Message** text area.

The **Save** button saves the message and sends it to the recipient.

The **Cancel** button closes the FYI dialogue without sending the message.

3.9 Send the document as PDF file by e-mail

The user can send the document as a PDF file by e-mail with the button



The user can include a **Document list** in the message according to the search result.

When the user checks the radio button **No**, the list won't be included.

When the user checks the radio button **Yes, with all columns**, the document list will be included in the message as such.

When the user checks the radio button Yes, with selected columns, he/she can edit the list before sending it and leave out columns.

With the latter selection, **Select columns** will be displayed. The user selects the desired columns from the framework in the left and moves them to the **Selected** framework with the arrow key . The order of the selected columns can be changed with **Move up** and **Move down** buttons. Columns can be deleted from the framework with the **Delete** function available by clicking the right button of the mouse. The user

can hide **Select columns** with the **Minimize** button and make it visible again with the **Display select columns** button.

When the user checks the **Active document** checkbox, the message to be sent concerns the active document.

The active document page is sent as a PDF file with the selection **Current page** (x = page number).

All document pages are sent as a PDF file with the selection **All pages (x-x)**.

Only the last page of the active document is sent as a PDF file with the selection **Last page (x)**.

Selected pages of the active document are sent as a PDF file with the selection **Range**.

Checking the **Comments** checkbox means that the document's comments are included in the document..

A header for the document can be assigned in the **Header** field.

Include rows with **No** selection document rows are not included in the message. Selection **Yes, with all columns** the document rows are sent as they are. Selection **Yes, with selected columns** the rows are sent having containing only selected colums.

The document's routing history can be included in the message by selecting **Include routing history**. When the user checks the radio button **No**, history data won't be included. When the user checks the radio button **Yes, with all columns**, routing history will be included in the message as such. When the user checks the radio button **Yes, with selected columns,** he/she can edit the list before sending it and leave out columns. Selecting columns is a similar process as with the document list.

The document's value history can be included in the message by selecting **Include value history**. When the user checks the radio button **No**, history data won't be included. When the user checks the radio button **Yes, with all columns**, value history will be included in the message as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before sending it and leave out columns. Selecting columns is a similar process as with the document list.

Orientation of the document can be set either as portrait or landscape.

Font type, size and line spacing of the message are defined in the fields for **font**.

When the user clicks the **Send** button, the system will open a dialogue where the recipient is selected.

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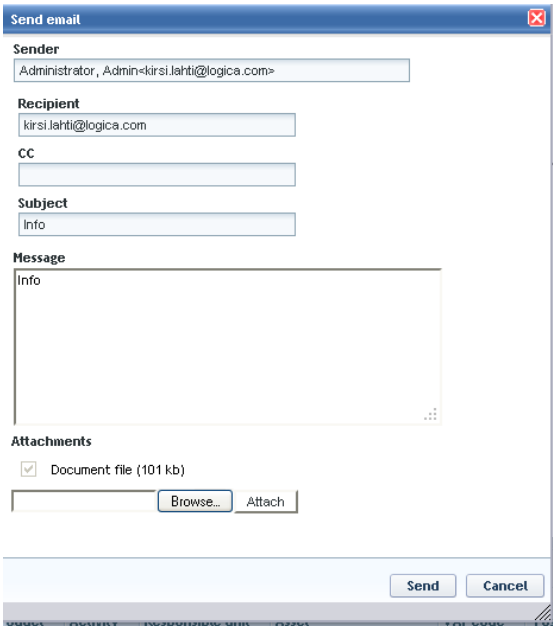


The **Sender** field will automatically contain the information of the active user.

The user enters the recipient's e-mail address in the **Recipient** field.

CC will contain those users to whom the document is sent in addition to the recipient.

The user can provide a name for the e-mail in the **Subject** field.

The message to the recipient is entered in the **Message** text area.

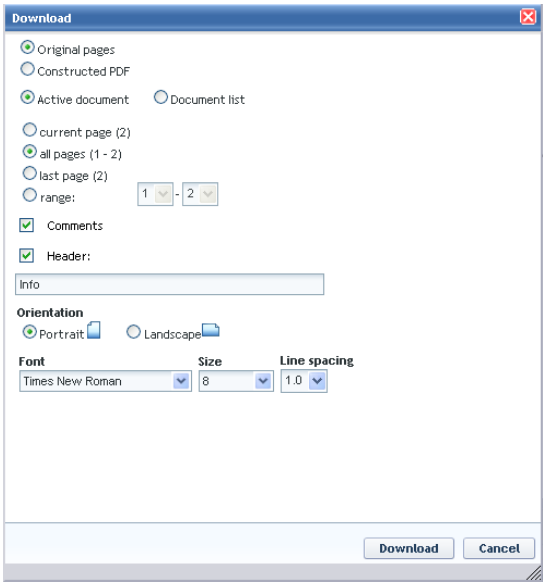
The user can add attachments to the document in the **Attachments** section. The attachment is searched with the **Browse** button and attached to the e-mail with the **Attach** button.

The **Send** button will send the document to the selected recipient.

The **Cancel** button closes the dialogue without sending the document.

3.10 Download the document

The user can download a document or a document list to his/her own PC with the **Download document on own PC** button. The function will open the **Download** dialogue where the user can provide the necessary information for saving.



With the option **Original pages**, e.g. the original .tiff documents are saved.

The pages are saved as PDF documents with **Constructed PDF** option.

The user can save either the **Active document** or **Document list** in the file.

Current page (x) saves the document's active page (x = page number).

All pages (x-x) saves all pages of the active document.

Last page (x) saves the last page of the active document.

Selected pages of the active document are saved with the selection **Range**.

Checking the **Comments** checkbox means that the document's comments are saved in addition to the actual pages.

A name for the document to be saved can be assigned in the **Header** field.

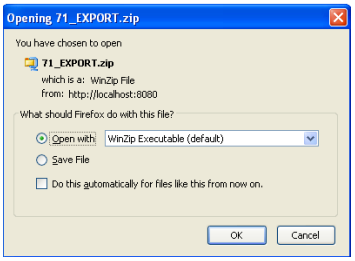
Orientation of the document can be set either as portrait or landscape.

Font type, size and line spacing of the message are defined in the fields for **font**.

The **Download** button saves the document or the document list.

The **Cancel** button closes the dialogue without saving the document.

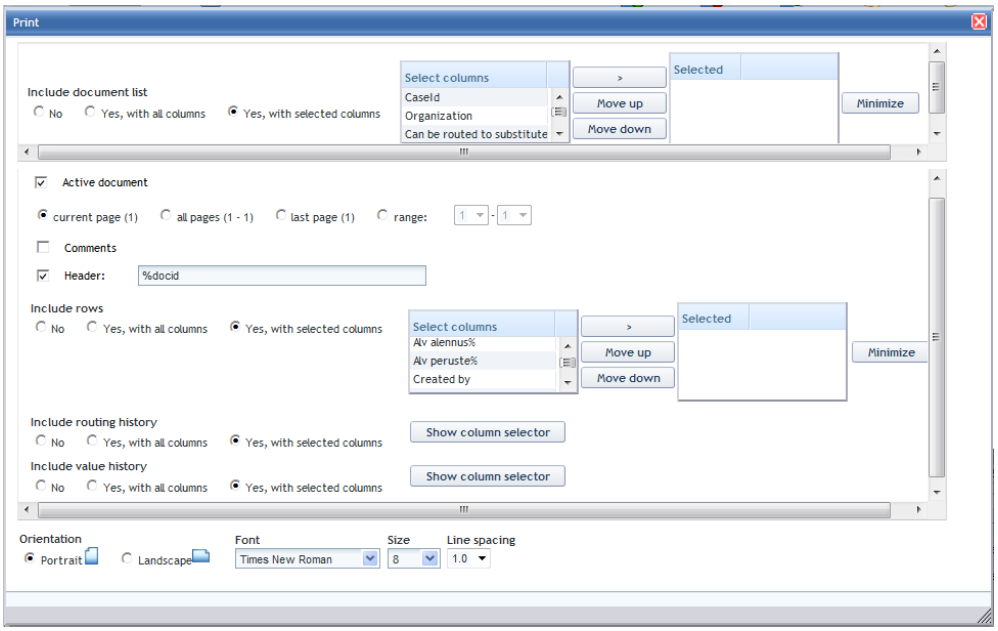
With Mozilla, the location for downloading the file is confirmed with the following notification:



3.11 Print the document

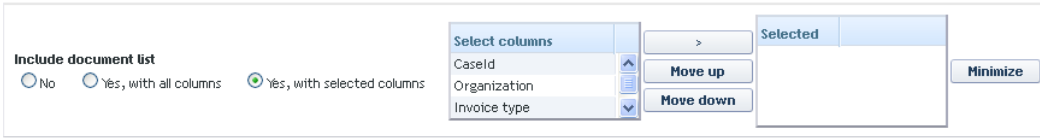
When the user clicks the **Print document and/or comments** button, the system will open a dialogue where the user can provide the information needed in printing the document. The printing function turns the document into a PDF file which can be printed.

This function doesn't print files in **HTML format**; they are printed with the **Print** function available by clicking the right button of the mouse.



The user can include a **Document list** in the printout according to the search result. When the user checks the radio button **No**, the list won't be included. When the user checks the radio button **Yes, with all columns**, the document list will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before sending it and leave out columns.

With the latter selection, **Select columns** will be displayed.



The user selects the desired columns from the framework in the left and moves them to the **Selected** framework with the arrow key . The order of the selected columns can be changed with **Move up** and **Move down** buttons. Columns can be deleted from the framework with the Delete function available by clicking the right button of the mouse. The user can hide **Select columns** with the **Minimize** button and make it visible again with the **Display select columns** button.

Definitions provided after selecting the option **Active document** concern the active document.

The user can print the document's active page by selecting **Current page (x)** (x = page number).

The user can print all pages in the document by selecting **All pages (x-x)**.

The user can print the document's last page by selecting **Last page (x)**.

The selected pages of the active document are printed with the selection **Range**.

Checking the **Comments** checkbox means that the document's comments are also printed.

A name for the printout can be assigned in the **Header** field. By default the field's value is **%docid** , when the option is activated the document header contains doc id.

Orientation of the printout can be set either as portrait or landscape.

The document's postings can be printed by selecting the function **Include rows**. When the user checks the radio button **No**, the list won't be included. When the user checks the radio button **Yes, with all columns**, the postings will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

The user can print the document's routing history by selecting **Include routing history**. When the user checks the radio button **No**, the list won't be included. When the user checks the radio button **Yes, with all columns**, routing history will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

The user can print the document's value history by selecting **Include value history**. When the user checks the radio button **No**, the list won't be included. When the user checks the radio button **Yes, with all columns**, the value history will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

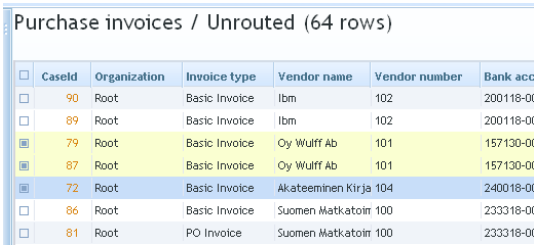
Font type, size and line spacing of the printout are defined in the fields for **font**.

The **Print** function generates a .pdf file according to the definitions described above, and the system will open the file in a new browser window/tab (depending on the browser configuration) where the user can print the information.

The **Cancel** button closes the dialogue without printing the material.

3.12 Mass change

The user can perform the same action for several documents at the same time by checking the checkboxes in front of the documents in the document list. This way the action to be performed will apply to all selected documents.

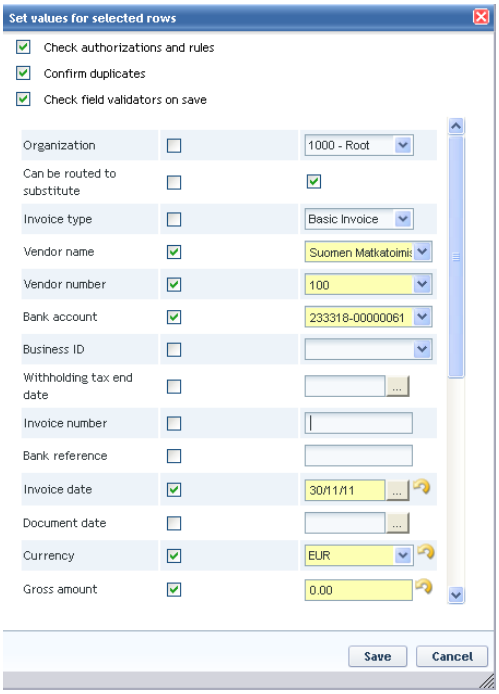

Purchase invoices / Unrouted (64 rows)
CaseId
Organization
Invoice type
Vendor name
Vendor number
Bank acc
90 Root Basic Invoice Ibm 102
89 Root Basic Invoice Ibm 102
79 Root Basic Invoice Oy Wulff Ab 101
87 Root Basic Invoice Oy Wulff Ab 101
72 Root Basic Invoice Akateeminen Kirja 104
86 Root Basic Invoice Suomen Matkatoim 100
81 Root PO Invoice Suomen Matkatoim 100

The **Mass change** function above the document list opens a dialogue where the user selects either **Change fields** or **Change locks**.

Depending on the user's selection, the system will open a dialogue where header or lock information will be provided to all documents selected in the document list.

3.12.1 Change fields

In the example below, the following information is provided for the documents: Vendor information, Invoice date, Currency and Gross amount.



The user selects the fields he/she wants to update by checking the checkbox in front of each field. If the field contains a value but its checkbox hasn't been checked, the value won't be saved in the documents. If the checkbox is checked but the field doesn't contain a value, an empty value will be saved in the documents in the field in question.

When the user selects **Check authorisations and rules**, the system will check that the provided values are in accordance with defined rules and authorisations.

When the user selects **Confirm duplicates**, the system will check that documents with the same information haven't been saved in the system before on the basis of duplicate confirmation settings.

When the user selects **Check field validators on save**, the system will check that the provided values are in accordance with field specifications.

The **Save** function will take the information provided in the selected fields to all documents that were selected in the list.

The **Cancel** button closes the dialogue for mass changing without saving the provided information.

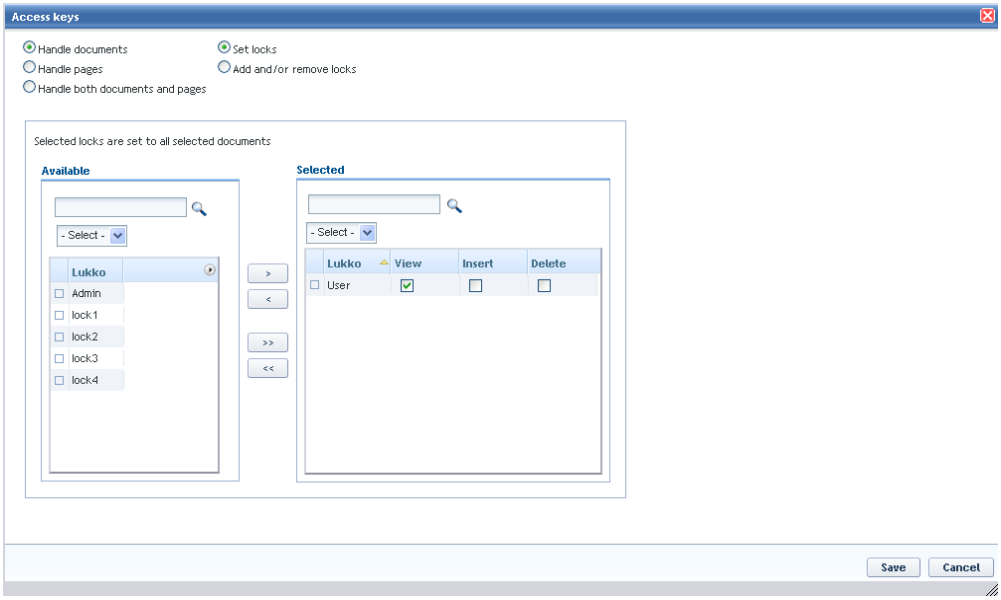
3.12.2 Change locks

In the example below, the user will **Set locks to documents**.

When the user selects **Handle documents**, the selected locks are only set to documents, not pages.

When the user selects **Handle pages**, the selected locks are only set to document pages, not documents.

When the user selects **Handle both documents and pages**, the selected locks are set both to document pages and documents.



The user selects locks that will be set in the **Available** framework on the left and transfers them to the **Selected** framework with arrow keys > . The selected lock can be removed with <

Several locks can be transferred at the same time with double arrow buttons >> and <<.

The access key settings are saved with the **Save** button.

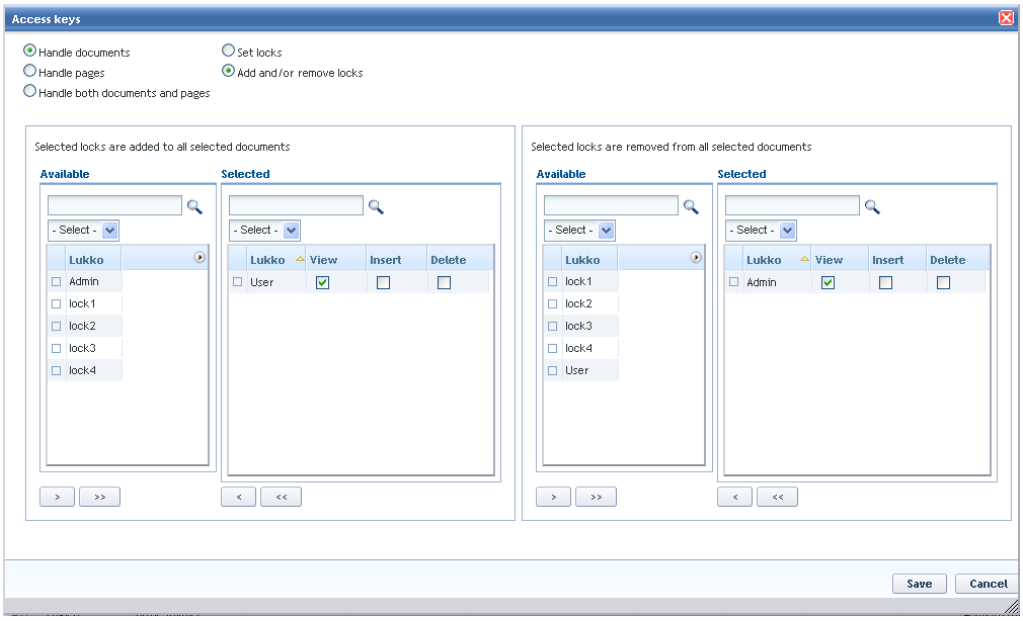
The **Cancel** button closes the dialogue without saving the changes.

In the example below, the user will **Add and/or remove locks**.

When the user selects **Handle documents**, the selected locks are only added to / removed from documents, not pages.

When the user selects **Handle pages**, the selected locks are only added to / removed from document pages, not documents.

When the user selects **Handle both documents and pages**, the selected locks are added to / removed from both document pages and documents.



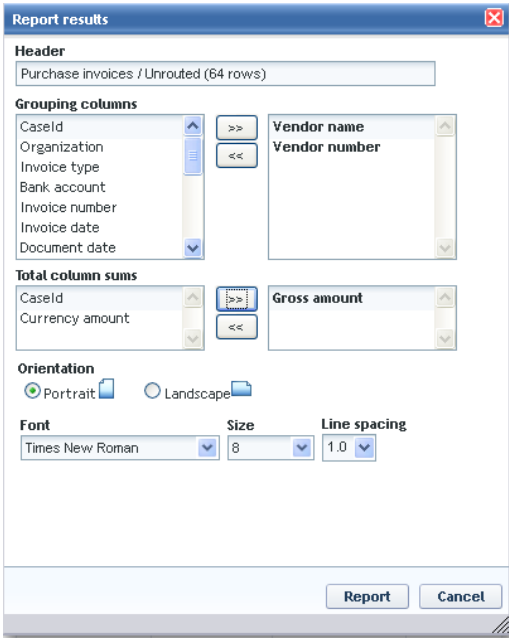
The user defines locks to be added to selected documents in the framework on the left with arrow keys.

Locks to be removed from selected documents are defined in the framework on the right with arrow keys.

Using arrow keys is described in the section for setting locks.

3.13 Report

The user can generate a report of the query result. The **Report** function opens the dialogue for defining the report.



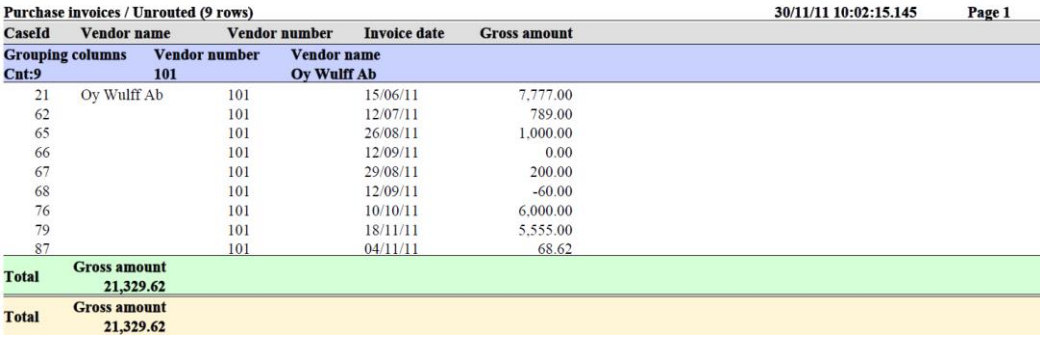
Grouping column(s) and **Total column sums** are defined for the report.

Orientation of the report printout can be set either as portrait or landscape.

Font, Size and Line spacing used in the report are also defined in the section for **font**.

The report is generated by clicking the **Report** button.

A PDF report is generated with the **Report** button. An example of a report is presented below:



Purchase invoices / Unrouted (9 rows) 30/11/11 10:02:15.145 Page 1

CaseId	Vendor name	Vendor number	Invoice date	Gross amount
Grouping columns Cnt:9		Vendor number 101	Vendor name Oy Wulff Ab	
21	Oy Wulff Ab	101	15/06/11	7,777.00
62		101	12/07/11	789.00
65		101	26/08/11	1,000.00
66		101	12/09/11	0.00
67		101	29/08/11	200.00
68		101	12/09/11	-60.00
76		101	10/10/11	6,000.00
79		101	18/11/11	5,555.00
87		101	04/11/11	68.62
Total	Gross amount 21,329.62			
Total	Gross amount 21,329.62			

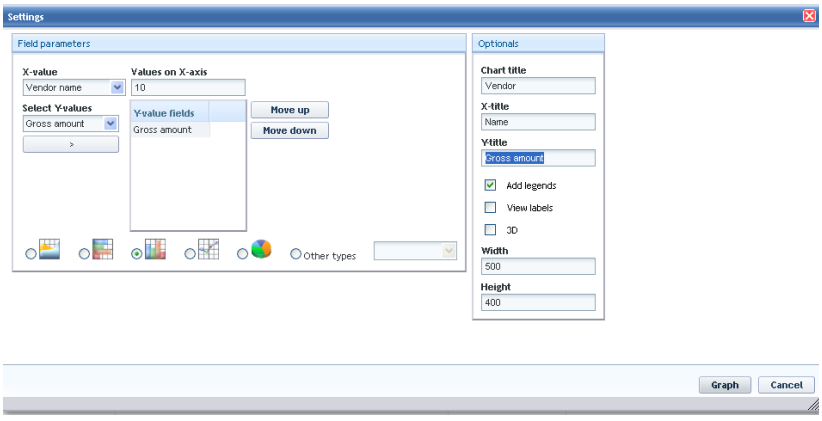
The user can download the PDF report in his/her PC and print it.

3.14 Graph

The user can define a graphic presentation of the search result in the dialogue available by clicking the **Graph** button above the document list.

The user defines **X value** (e.g. vendor's number) and **Y value** (e.g. gross amount) for the designed chart in the **Field parameters** section.

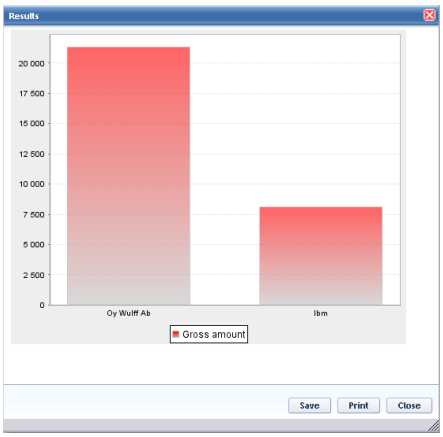
In the **Optionals** section, the user can provide additional specifications for the chart: **Chart title, X title** and **Y title** and define the size of the chart.



The system generates the graphics according to the given specifications with the **Graph** function.

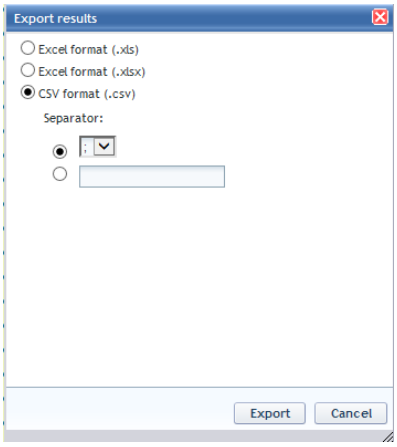
The **Cancel** button closes the graph settings dialogue without generating the graph.

Below there's an example of a graph generated according to the specifications provided above:



3.15 Export

The user can save the search result as an **Excel** (.xls or .xlsx) or **CSV** file by clicking the **Export** button above the document list.



The search result can be modified and the changes saved e.g. in Excel.

If the user selects the CVS format, the separator must also be provided.

3.16 Generating a document PDF online

It’s possible to generate a document page online. The PDF can be generated containing static texts, images, logos and background pdf.

The *.txt file is loaded for the document page, containing FO-XSL reference and data that will be generated to PDF. To make this possible there is need for system binaries for FOP control xsl and for needed images, logos and background pdf. To allow selection of images in document’s basic fields, new field “Visual” is needed in index configuration. Internal manual for Admin describes more details how to configure whole function into use.

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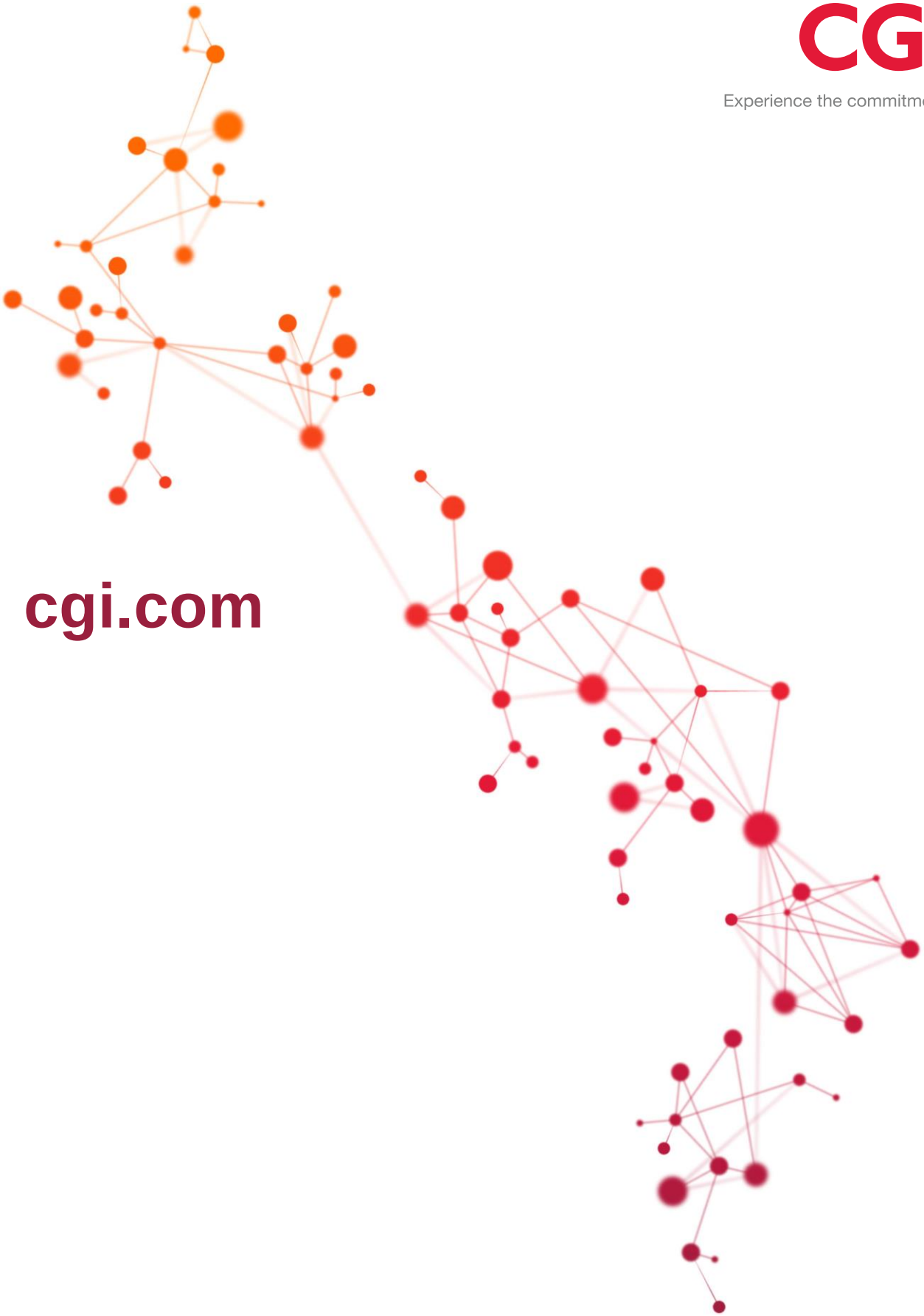

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